

When completing the Deployment Summary document as part of the recent Software Asset Management engagement, you answered some questions about SAM assessment in your organization. This report is to provide feedback which we hope will be helpful to your efforts to manage this difficult but important aspect of IT governance. There are three sections - a summary of your responses, a graphical interpretation of those responses, and some practical recommendations based on those responses. Finally, there are some links to further resources, should you require them.

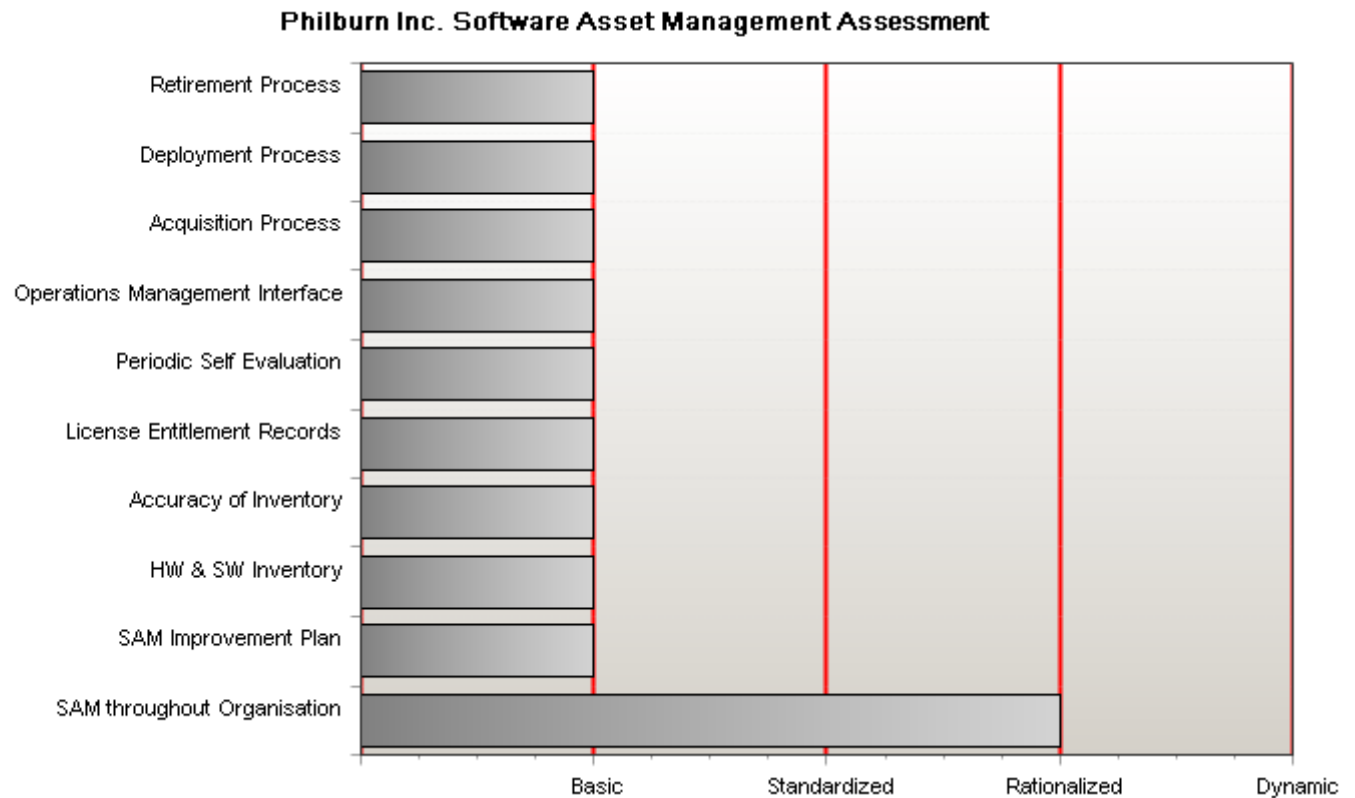
Summary of Responses

Survey Question 1:	Is there an individual or team that is dedicated to the implementation of Software Asset Management within your organisation?
Your Response:	C) There is a full time, dedicated resource to SAM. SAM processes exist, however they are not documented
Survey Question 2:	Does your organisation conduct regular reviews of SAM processes to identify areas of improvement?
Your Response:	A) There is no plan for implementing SAM; or no SAM improvement plan has been completed
Survey Question 3:	Do you have a hardware & software inventory tool deployed?
Your Response:	A) There is no inventory discovery tool implemented, manual checks can be completed
Survey Question 4:	Do you perform checks to ensure the accuracy of the software inventory?
Your Response:	*A) Checks to verify the accuracy of the software inventory are not currently performed
Survey Question 5:	Do you have a repository or software asset register that contains details of all licences you have purchased?
Your Response:	A) There is no dedicated software asset register
Survey Question 6:	Do you carry out reconciliations between software deployed and licences purchased?
Your Response:	*A) Deployment & entitlement reconciliation is rarely done or ad-hoc
Survey Question 7:	Do other business divisions within your organisation have access to your hardware and software asset registers?
Your Response:	A) There is no software asset register
Survey Question 8:	Is all of your software purchased and tracked by a designated person or group?
Your Response:	A) Anyone is permitted to order software, or less than 70% is controlled by an individual or group
Survey Question 9:	Do you use standardised processes for software deployment?
Your Response:	A) The organisation utilises manual methods for all software deployment
Survey Question 10:	Where it is legal to do so do you re-use licences when disposing of hardware assets?
Your Response:	A) The organisation does not track software from the disposal of machines

*Please be aware that any question not answered is defaulted to the "Basic" response.

Graphical Interpretation of Responses

The chart below shows an assessment of how your responses position Philburn Inc. in terms of Software Optimization. The vertical axis shows the four stages of Software Asset Management Optimization Model. You can read more about these stages at <http://www.microsoft.com/sam/en/us/optmodel.aspx>



Recommendations

What practical steps can your organization take to improve SAM Optimization? Rather than overwhelming you with pages of literature on this subject, we have tried to isolate some practical and realistic steps that your organization can take. These recommendations are based on your responses to the SAM Assessment Survey and emphasise what we believe are the primary driving influences for improving Software Asset Management.

Recommendation #1	You have indicated that a full-time SAM resource is in place, but no SAM processes have been documented and no SAM improvement plan has yet been implemented. We recommend that your SAM resource is tasked with preparing a documented plan and instituting regular SAM reviews.
Recommendation #2	Monitoring software usage is a vital ingredient for SAM, and is very difficult to perform without the help of an automated discovery tool. For an organization of your size, there is no need to spend a lot of time or money on getting started, as free tools are available which do an adequate job. Check out the free downloadable MAP (Microsoft Assessment and Planning Toolkit) tool at www.microsoft.com/map . The site also contains instructions of how to use this tool to get started. Alternatively there are more complete dynamic inventory products and services (which are chargeable) - we recommend you contact a local SAM Partner for assistance.
Recommendation #3	Monitoring software usage is a vital ingredient for SAM, and is very difficult to perform without having a Software Asset Register in place. We recommend that you use the Estimated License Ownership Position Statement that you have just been provided as a basis to create an initial register and ensure you keep it up to date as you acquire new software.
Recommendation #4	Give consideration to implementing a policy whereby a central person or business unit is responsible for deciding which software forms part of your standard operating environment, negotiates pricing with a limited number of vendors and actions purchases centrally. Ensure this process is formalised and documented.

Further Resources and Information

As mentioned above, the aim of this document is to provide realistic and practical advice. Should you wish to access more detailed description of SAM Optimization and utilise more in-depth resources, the following links may prove useful.

- <http://www.microsoft.com/map>
- <http://www.microsoft.com/sam/en/us/default.aspx>
- <http://www.microsoft.com/sam/en/us/optmodel.aspx>